The European market potential for fashion accessories

Last updated:
05 November 2025

The European fashion accessories market follows general apparel industry trends and developments related to sustainability, circularity and corporate social responsibility, driven mainly by policy initiatives under the EU Green Deal.

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1. Product description: fashion accessories

For the purposes of this report, the fashion accessories category refers to three subcategories: scarves (including shawls, scarves, mufflers, mantillas, veils and similar articles), gloves (including mittens and mitts), and hats and other headgear.

Figure 1: Europe is one of the biggest markets (and growing) for scarves, gloves and hats

Source: IKECHUKWU JULIUS UGWU via Unsplash

The following niche items are not included: babies' gloves/mitts/mittens; special sports gloves; trade protection gloves; medical and surgical gloves; other rubber gloves; knitted/crocheted gloves that are impregnated, coated or covered with plastics or rubber; berets, bonnets; fezzes, skull caps, tarbooshes; hat shapes made by assembling strips of any material; headgear of fur skin; headbands, linings, covers, hat frames, peaks, chin straps; headgear for animals; toy or carnival headgear.

All three subcategories serve both practical purposes (protection from rain/sun/wind, comfort, temperature regulation) and social/aesthetic functions (fashion, versatility of styling, identity, cultural significance).

The scarves subcategory includes two main types:

- Scarves that are knitted/crocheted (25.1% of the EU scarves subcategory);
- Scarves that are not knitted/crocheted (74.9% of the EU scarves subcategory).

The gloves subcategory is best grouped by material composition:

- Gloves made of leather or composition leather (13.8% of the EU gloves subcategory)

- Knitted/crocheted gloves made from:
  - Wool/fine animal hair (3.1% of the EU gloves subcategory);
  - Cotton (4.4% of the EU gloves subcategory);
  - Synthetic fibres (37.2% of the EU gloves subcategory);
  - Other textile materials (3% of the EU gloves subcategory);
- Gloves that are not knitted or crocheted or made of leather or composition leather (38.6% of the EU gloves subcategory). This group includes faux/imitation leather gloves.

The hats subcategory is best grouped by construction method:

- Hats made by plaiting/assembling strips of material, such as straw and jute sun hats (5.1% of the EU hats subcategory);
- Traditional/formal hats made from components such as hat forms, hat bodies and hoods (1.6% of the EU hats subcategory);
- Peaked caps, including baseball caps and other headgear with peaks/visors (41.3% of the EU hats subcategory);
- Other hats and headgear, including – but not limited to – beanies and bucket hats (52% of the EU hats subcategory).

Table 1: HS code classification for fashion accessories

HS code	Subcategory	Knitted/crocheted	Fibre type	Impregnated, coated or covered with plastics or rubber	Other categorisation
61171000	Scarves	Yes	Various	N/A	N/A
62141000 62142000 62143000 62144000 62149000	Scarves	No	Various	N/A	N/A
42032990	Gloves	No	Leather or composition leather*	No	N/A
61169100	Gloves	Yes	Wool or fine animal hair	No	N/A
61169200	Gloves	Yes	Cotton	No	N/A
61169300	Gloves	Yes	Synthetic fibres	No	N/A
61169900	Gloves	Yes	Other textile fibres	No	N/A
62160000	Gloves	No	Various	Not mentioned	N/A

HS code	Subcategory	Knitted/crocheted	Fibre type	Impregnated, coated or covered with plastics or rubber	Other categorisation
65040000	Hats	N/A	N/A	N/A	Made by plaiting/assembling strips of material (such as straw and jute)
65050010 65069910	Hats	N/A	N/A	N/A	Traditional/formal hats made from components (such as hat forms, hat bodies and hoods)
65050030	Hats	N/A	N/A	N/A	Peaked caps (including baseball caps and other headgear with peaks/visors)
65050090 65069990	Hats	N/A	N/A	N/A	Other hats and headgear (including – but not limited to – beanies and bucket hats)

* Composition leather (also known as bonded or reconstituted leather) is a material made from leather scraps or fibres combined with binders like polyurethane or latex.

2. What makes Europe an interesting market for fashion accessories?

Europe is one of the largest importers of fashion accessories in the world, with an import value of €5.2 billion (up from €4.3 billion in 2019). Between 2019 and 2024, the value of the European Union's (EU) fashion accessories imports grew by an average of 3.5% annually. The largest of the three subcategories by far is hats, with a 52.7% share of the market, followed by scarves (26.2%). The gloves subcategory holds a 21.1% market share.

In 2019-2024, scarves and gloves saw market share losses (-9% and -2.3%, respectively), while the hats subcategory increased its share by 11.3%. Hats are also the highest growth category, with an average annual growth rate of 8.6% compared to gloves (1.4%) and scarves (-2.5%).

The better performance of the hats subcategory is largely due to its broader utility. Scarves and gloves are mainly designed to be used during the colder months of the year. Due to climate change, this colder period may get shorter each year. In contrast, various types of hats are worn depending on the season and climate.

Many hat styles can also be used for casual (fashion) wear and sports or activewear (such as baseball caps), while sports gloves and scarves are usually designed for (different) sporting activities.

Source: Eurostat, 2025

The European Union is also a large exporter and re-exporter of fashion accessories, with an export value of €5 billion in 2024 (up from €3.8 billion in 2019). The value of EU fashion accessories exports grew at an average yearly rate of 5.5% between 2019 and 2024.

Source: Eurostat, 2025

The market share by subcategory follows that of imports, with hats as a clear leader (47.6%), followed by scarves (38.4%). Gloves hold a 13.9% share of the market. Hats are the highest growth subcategory, with an average annual growth rate of 9.6% for 2019-2024, followed by gloves (3.8%) and scarves (2%).

The biggest EU exporters in 2024 were Italy (€1.19 billion), France (€1.11 billion), Germany (€653 million), the Netherlands (€651 million), Poland (€279 million) and Spain (€245 million). Together, these six countries represent over 82% of the EU's fashion accessories exports. France, the Netherlands, Poland and Spain all experienced export growth higher than the overall EU export growth rate (5.5%).

In 2024, fashion accessories imports originating from inside the EU accounted for 51.2% of the value of European fashion accessories imports, up from 43.5% in 2019. Developing country suppliers accounted for 44.7% of all fashion accessories imports into the EU in terms of value (down from 48.8% in 2019), while suppliers from the rest of the world accounted for just 4.1% (down from 7.7% in 2019).

The value of EU fashion accessories imports originating from developing countries was €2.3 billion in 2024 and increased at an average yearly rate of 1.7% since 2019 (almost 2 percentage points below the overall category growth rate). In the same period, fashion accessories imports from within the EU increased by 6.9%, almost double that of fashion accessories imports from all over the world.

Data and insights from industry experts suggest an increasing interest in intra-EU trade and premium, value-added products. However, these trade statistics hide the fact that a portion of intra-EU trade is in products originally manufactured and already exported to the EU by developing country suppliers, and which are subsequently re-exported as branded products. Therefore, this portion is not in direct competition with imports from developing countries.

The top 6 intra-EU exporters are also the top 6 importers of fashion accessories, indicating that certain EU countries are becoming increasingly important as regional distribution hubs. Growth of direct and indirect trade with developing countries is expected to continue, creating new opportunities for these countries.

Table 2: Top 10 non-EU fashion accessories exporters to the EU in 2024

Country	Share of extra-EU export	Share of total export to the EU	5-year average annual growth	Value
China	62.8%	30.6%	1.3%	€1.59 bn
Vietnam	5.7%	2.8%	8.4%	€144.6 m

Country	Share of extra-EU export	Share of total export to the EU	5-year average annual growth	Value
United Kingdom	4.2%	2.0%	-9.4%	€105.8 m
India	3.6%	1.8%	-4.5%	€92.6 m
Pakistan	3.2%	1.5%	0.5%	€80.2 m
Bangladesh	3.0%	1.5%	13.4%	€77.1 m
Indonesia	2.1%	1.0%	7.3%	€53.5 m
Madagascar	1.9%	0.9%	-8.0%	€47.2 m
Türkiye	1.6%	0.8%	1.7%	€41 m
Tunisia	1.6%	0.8%	9.3%	€40.1 m

Source: Eurostat, 2025

China is the largest fashion accessories exporter to the EU, with a market share exceeding 30% of all exports to the EU and 62.8% of extra-EU exports to the EU. In 2019-2024, the United Kingdom experienced the biggest loss of market share (9.4%) as the effects of Brexit continue to play out. India and Madagascar lost 4.5% and 8% market share, respectively, while Bangladesh, Tunisia, Vietnam and Indonesia all significantly increased their market shares (by 13.4%, 9.3%, 8.4% and 7.3%, respectively).

Table 3: Top 10 intra-EU fashion accessories exporters to the EU in 2024

Country	Share of intra-EU export	Share of total export to the EU	5-year average annual growth	Value
Italy	18.6%	9.5%	9.5%	€496.2 m
Germany	18.4%	9.4%	4.6%	€490.7 m
The Netherlands	15.3%	7.8%	11.9%	€408.4 m
France	11.9%	6.1%	5.0%	€318.5 m
Poland	8.4%	4.3%	10.8%	€224.2 m

Country	Share of intra-EU export	Share of total export to the EU	5-year average annual growth	Value
Spain	6.1%	3.1%	6.1%	€163.8 m
Belgium	5.9%	3.0%	-2.8%	€157.4 m
Czechia	2.9%	1.5%	9.3%	€77.6 m
Austria	2.0%	1.0%	10.7%	€53.3 m
Denmark	1.9%	1.0%	4.1%	€51 m

Source: Eurostat, 2025

Italy, Germany, the Netherlands and France dominate the intra-EU fashion accessories trade. Together, these four countries account for 32.8% of all fashion accessories exports to the EU and 64.2% of all intra-EU fashion accessories exports. While intra-EU imports experienced an average growth rate of 6.9% between 2019 and 2024, imports from the Netherlands, Italy, Poland, Czechia and Austria all grew at a higher rate, with the Netherlands, Poland and Austria achieving double-digit growth.

Uncertainty around American trade policy will make Europe a safer bet

In April 2025, US President Trump announced (higher) import tariffs on goods from many countries around the world. Many developing countries on the list of exporters are facing tariffs higher than the 10% base rate. The new measures include tariffs of over 19% on products from all six top exporters of apparel to the USA (China, Vietnam, Bangladesh, India, Indonesia and Cambodia). Most of these tariffs are in effect as of 7 August 2025.

While the implementation and full impact of these policy changes remain unclear at the time of writing this report, it is clear that a lot of uncertainty will surround the American market in the short-to-medium term. The apparel industry expects to see a shift towards products ‘made in the USA’ and/or in other nearby apparel-producing countries with lower tariffs, like Honduras (10%). At the same time, China is likely to shift its focus from the US to the EU, which could result in increased competition.

3. Which European countries offer the most opportunities for fashion accessories?

Western European markets are larger and more developed than those in Central and Eastern Europe. Brands and retailers in Western Europe have more advanced systems for sourcing products and managing compliance. They also tend to have better innovation capabilities and stronger branding.

The largest fashion accessories import markets in the EU are Germany, France, the Netherlands, Italy, Spain and Poland. These top six countries together accounted for 71.6% of all EU fashion accessories imports in 2024.

Table 4: Top 10 EU importers of fashion accessories from developing countries, 2024

Country	Value	Average annual growth	Developing country share 2024	Developing country imports average annual growth	Developing country imports change in share 2019-2024
Germany	€997.8 m	2.2%	48.4%	-0.3%	-6.3%
France	€948.8 m	2.8%	43.2%	2.9%	0.3%
The Netherlands	€527.9 m	3.8%	68.9%	4.2%	1.2%
Italy	€522.2 m	4.0%	41.2%	1.5%	-5.4%
Spain	€391.2 m	4.5%	50.5%	1.0%	-9.5%
Poland	€343.6 m	9.8%	33.3%	7.3%	-4.1%
Belgium	€241.9 m	-2.7%	59.1%	-4.5%	-5.8%
Austria	€217 m	4.7%	14.7%	4.2%	-0.3%
Sweden	€187.1 m	3.3%	53.5%	0.7%	-7.1%
Denmark	€121.4 m	4.0%	46.6%	3.0%	-2.1%
EU total	€5.21 bn	3.5%	44.7%	1.7%	-4.1%

Source: Eurostat, 2025

Out of the top 10 importers, the Netherlands, Belgium, Sweden and Spain stand out in terms of developing-country sourcing of fashion accessories, with 68.9%, 59.1%, 53.5% and 50.5% shares, respectively.

Poland grew its imports from developing countries by an average of 7.3% per year during 2019-2024, which is over 5.5 percentage points higher than the EU average. However, developing-country sourcing growth was 2.5 percentage points below overall import growth. Among the top 10 importing countries, only France and the Netherlands sourced more from developing countries in 2024 compared to 2019 (with increases of 0.3% and 1.2% market share, respectively).

Germany: most populous country in Europe

Germany is the largest import market for fashion accessories in Europe, with an import value of €997.8 million in 2024 (up from €896.2 million in 2019). Between 2019 and 2024, the value of Germany's fashion accessories imports grew at an average rate of 2.2% per year, which is below the EU average.

Germany sources 48.4% of its fashion accessories imports from developing countries in terms of value, which is slightly higher than the EU average. Developing-country imports declined by 0.3% per year in 2019-2024, losing 6.3% share in total.

Table 5: 2024 imports of fashion accessories to Germany

	Value 2024	Share 2024	5-year growth
Gloves	€244.4 m	22.5%	-0.1%
Scarves	€239.3 m	24.0%	-4.1%
Hats	€533.9 m	53.5%	7.3%
Total	€997.8 m	100%	2.2%

Source: Eurostat 2025

Germany has strict and increasing sustainability requirements, driven by national legislation and policies. Some German legislation on harmful chemicals goes beyond EU legislation. Germany also has its own social and environmental standard, the Grüner Knopf label, which is displayed at the point of sale (POS). Although supplying the German market requires investment in chemical management and certification, this will provide opportunities for higher quality and sustainable products in the coming years.

Well-known German brands and retailers producing and/or retailing fashion accessories include Peek & Cloppenburg, Zalando, Hugo Boss, JOOP!, S Oliver and Tom Tailor. German brands that specialise in fashion accessories include Roeckl, Fraas and Lierys.

Figure 5: The market for gloves is biggest in the colder, northern/mountainous parts of Europe, including Scandinavia, Germany, Poland and Austria

Source: Anita Austvika via Unsplash

France: volume market with increasing sustainability requirements

France is the second-largest import market for fashion accessories in Europe, with an import value of €948.8 million in 2024 (up from €826.3 million in 2019). Between 2019 and 2024, the value of French fashion accessories imports grew at an average rate of 2.8% per year, which is below the EU average.

France sources 43.2% of its fashion accessories imports from developing countries in terms of value, just below the EU average. Developing-country imports grew at an average annual rate slightly higher than the country's total fashion accessories imports (2.9% per year compared to 2.8%) in 2019-2024, leading to a slight increase in developing-country share of 0.3%.

France is the only country whose value of scarves imports is higher than that of hats, with a 41.9% share compared to an EU average of 26.2%. This indicates that in France, scarves are often worn for aesthetic purposes. They are made from lightweight materials and serve no functional purpose (such as temperature regulation).

Table 6: 2024 imports of fashion accessories to France

	Value 2024	Share 2024	5-year growth
Gloves	€ 157.9 m	16.7%	0.1%
Scarves	€ 397.7 m	41.9%	-0.3%
Hats	€ 393.0 m	41.4%	8.2%
Total	€ 948.8 m	100%	2.8%

Source: Eurostat, 2025

France is expanding its legislation on sustainability, in particular chemicals legislation. It is now a legal requirement in France to inform customers about products that contain substances on the REACH Substances of Very High Concern (SVHC) list at the point of sale. France is also the first EU country to put in place specific regulations for MOSH/MOAH: mineral oils often used in the printing inks of packaging materials and recycled paper. This could present a challenge for suppliers in the volume/budget segment.

Well-known French brands and retailers producing and/or retailing fashion accessories include La Redoute, The Kooples, Monoprix, Hermes, Louis Vuitton, Soeur, ba&sh and APC.

Figure 6: In Southern European countries, lightweight scarves are often worn for aesthetic purposes rather than for warmth

Source: Lance Reis via Unsplash

The Netherlands: important EU distribution hub

The Netherlands is the third-largest import market for fashion accessories in Europe, with an import value of €527.9 million in 2024 (up from €438.3 million in 2019). Between 2019 and 2024, the value of Dutch fashion accessories imports grew at an average rate of 3.8% per year, slightly higher than the EU average.

The Netherlands sources 68.9% of its fashion accessories imports from developing countries in terms of value, which is 24.2% more than the EU average of 44.7% and more than any other EU market. Developing-country imports grew at a higher average annual rate than the country's total fashion accessories imports in 2019-2024, with the market share of developing countries increasing by 1.2%.

Table 7: 2024 imports of fashion accessories to the Netherlands

	Value 2024	Share 2024	5-year growth
Gloves	€ 109.1 m	20.7%	1.3%
Scarves	€ 105.9 m	20.1%	-2.6%
Hats	€ 312.8 m	59.2%	7.8%
Total	€ 527.9 m	100.0%	3.8%

Source: Eurostat 2025

The Netherlands profits from a favourable business climate that facilitates import and export. This, combined with its proximity to sea and availability of harbours, makes it an ideal route for product import into Europe. For this reason, many foreign apparel brands have their headquarters in the Dutch capital, Amsterdam.

Well-known Dutch brands and retailers producing and/or retailing fashion accessories include Barts, C&A, HEMA, G-Star, Scapino and A Fish Named Fred.

Italy: global leader in luxury

Italy is the fourth-largest import market for fashion accessories in Europe, with an import value of €522.2 million in 2024 (up from €428.9 million in 2019). Between 2019 and 2024, the value of Italy's fashion accessories imports grew at an average rate of 4% per year, slightly higher than the EU average.

Italy sources 41.2% of its fashion accessories imports from developing countries in terms of value. This is slightly lower than the EU average of 44.7%, and the lowest among the top 6 importers, with the exception of Poland. In 2019-2024, developing-country imports grew by 1.5%, but developing countries lost 5.4% market share. Market share for the scarves subcategory is 34.7%, which is 8.5% higher than the EU average. This indicates that, like in France, scarves are often worn for aesthetic purposes. Another reason is that the relatively mild climate leads to fewer sales of gloves, increasing the market share of scarves.

Table 8: 2024 imports of fashion accessories to Italy

	Value 2024	Share 2024	5-year growth
Gloves	€ 74.4 m	14.3%	3.1%
Scarves	€ 181.4 m	34.7%	-2.2%
Hats	€ 266.4 m	51.0%	10.4%
Total	€ 522.2 m	100.0%	4.0%

Source: Eurostat

Well-known Italian brands and retailers producing and/or retailing fashion accessories include Prada, Dolce & Gabbana, Benetton, Diesel, Miu Miu and OVS. Italy has a number of brands specialising in high-quality, luxury fashion accessories (including many that are made in Italy) like Sermoneta, Fratelli Orsini, Loro Piana and Fumagalli. These brands generally use high-quality materials such as leather, silk, wool and cashmere.

Spain: home to some of the largest international retailers in Europe

Spain is the fifth-largest import market for fashion accessories in Europe, with an import value of €391.2 million in 2024 (up from €313.1 million in 2019). Between 2019 and 2024, the value of Spain's fashion accessory imports grew at an average rate of 4.5% per year, one percentage point higher than the EU average.

Spain sources 50.5% of its fashion accessories imports from developing countries in terms of value. However, in 2019-2024, developing country imports grew by just 1% and lost 9.5% market share, the biggest loss among the top 10 importing EU countries. Although Spain enjoys a warmer climate than most other European countries, the scarves subcategory has a higher market share of fashion accessory imports than the EU average, indicating that scarves are often worn for aesthetic purposes.

Table 9: 2024 imports of fashion accessories to Spain

	Value 2024	Share 2024	5-year growth
Gloves	€64.6 m	16.5%	6.2%
Scarves	€115.5 m	29.5%	-2.6%
Hats	€210.9 m	53.9%	9.6%
Total	€391.2 m	100.0%	4.5%

Source: Eurostat, 2025

Well-known Spanish brands and retailers producing and/or retailing fashion accessories include El Corte Inglés, Zara, Massimo Dutti, Stradivarius, ECOALF and Cortefiel. Brands specialising in fashion accessories include Loewe, Santacana and BIMBA Y LOLA.

Poland: Fastest-growing economy in Europe

Poland is the sixth-largest import market for fashion accessories in Europe, at an import value of €343.6 million in 2024 (up from €215.2 million in 2019). Between 2019 and 2024, the value of Poland's fashion accessories imports grew at an average rate of 9.8% per year.

Poland sources just 33.3% of its fashion accessories imports from developing countries in terms of value, the lowest among the top 6 importers. Poland's developing country import share also fell by 4.1%, which is in line with the EU average.

Table 10: 2024 imports of fashion accessories to Poland

	Value 2024	Share 2024	5-year growth
Gloves	€80.3 m	23.4%	6.2%
Scarves	€63.0 m	18.3%	5.5%
Hats	€200.2 m	58.3%	13.2%
Total	€343.6 m	100.0%	9.8%

Source: Eurostat, 2025

Poland is currently not a suitable market for value-added or sustainable products because of lower GDP and wages and a lower level of awareness regarding sustainability issues among Polish consumers. As Poland's economy continues to grow and domestic brands establish themselves, it is expected to further develop its sourcing network and reduce its reliance on intra-EU imports.

Well-known Polish brands and retailers producing and/or retailing fashion accessories include Reserved, House, Mohito and Cropp.

Tips:

Focus your efforts on the top import markets for fashion accessories that also import a higher share of fashion accessories from developing countries compared to the EU average (Germany, France, the Netherlands and Spain).

Consider tapping into demand for fashionable lightweight scarves in France, Italy and Spain. It is important to invest in researching colour and design trends and building capabilities for developing new designs. The bi-annual trade event Première Vision (Paris) publishes free season and colour reports on its website.

Visit the websites of the main brands/retailers for each European country to understand the requirements, styles and aesthetics for different types of fashion accessories. Analyse online platforms like Zalando, ASOS and ABOUT YOU for trends, detailed product descriptions and reviews/ratings.

Research your target market(s) to identify which potential buyers are a good fit for your business. Create a list with useful information about potential buyers, including location, size, product types, target consumer gender/age, price level, manufacturing locations, materials used and whether or not they have a sustainability focus.

4. Which trends offer opportunities or pose threats in the European fashion accessories market?

The European fashion accessories market follows general apparel industry trends and developments related to sustainability, circularity and corporate social responsibility (CSR). European end consumers are willing to pay more for fashion accessories that combine creative design, versatility, comfort/fit, high quality and/or more sustainable materials.

The casual hat has transitioned from practical accessory to fashionable must-have

The baseball cap, bucket hat and beanie all have their origins in necessity: to protect against wind, rain, sun and cold temperatures while playing baseball, fishing and sailing, respectively.

During the second half of the 20th century, these hats became iconic wardrobe staples within some urban youth subcultures: the mod movement, skateboarding and the hip-hop community. These subcultures have all influenced the more recent popularity of streetwear. From the 2010s, with the help of celebrity endorsements, streetwear has become increasingly integrated into mainstream fashion across all value segments (including luxury). As a result, these three types of casual hats are now worn by adults and children of all ages. The global streetwear market is projected to grow from USD 347 billion in 2024 to USD 637 billion by 2032.

The growing popularity of sports apparel in mainstream fashion has established the baseball cap as a staple in everyday wardrobes across Europe. European fashion sportswear growth is far surpassing apparel growth (8% compared to 3.2% average annual growth in 2021-2023). For more information, read the CBI report on the European fashion sportswear market.

Sports hats are becoming more popular in Europe

European bucket hat market sales revenue stood at USD 61.2 million in 2021, and is expected to reach USD 130.6 million by 2033. European baseball cap market sales revenue stood at USD 4.8 billion in 2021, and is expected to reach USD 6.4 billion by 2033.

The baseball cap and bucket hat are often used during sports and other outdoor activities to aid visibility and protect from the sun's harmful UV rays. Growth in the use of these types of hats in Europe can be attributed to a rising rate of participation in sports, as well as heightened sun safety awareness among Europeans.

The latest European Commission's Eurobarometer survey found that 55% of EU respondents engage in exercise or play sports, and 38% of respondents do so at least once a week. Northern European countries have a higher rate of participation in sports: that of the Netherlands and Germany is higher than average (75% and 68%), France and Spain are in line with the European average (55% and 53%), while Poland trails with the third-lowest rate in the EU (35%).

2024 was the warmest year recorded in Europe, and Europe is the fastest-warming continent globally. It saw the largest temperature rise (2.7°C in Western Europe, 2.6°C in Southern Europe and 2.4°C in Eastern Europe) of all the continents in 2024, compared to the 1951-1980 baseline. The global average temperature rise was 1.28°C.

According to Statista, of the 10 countries with the highest rates of skin cancer as a percentage of the population, seven are European, due largely to their relatively fair-skinned populations. Awareness of these developments is starting to change the behaviour of Europeans. Many seek to protect their faces from exposure by wearing a hat. As children's skin is even more delicate than adult skin, protecting children from the harmful effects of the sun has become a top priority for parents and schools.

European brands and retailers are using more sustainable materials

Under the EU Green Deal, the EU Strategy for Sustainable and Circular Textiles aims to ensure that, by 2030, textile products placed on the EU market are durable, recyclable, mainly made from recycled fibres, free of hazardous chemicals, and produced with respect for social rights and the environment. Any manufacturer wishing to enter the European market must develop a sustainability strategy.

The European fashion industry is scaling up the use of more sustainable materials in all product and price/value segments. This is creating opportunities for fashion accessories suppliers with the right raw material sourcing networks. More sustainable raw materials relevant for hats, scarves and gloves include:

- Organic cotton (GOTS-certified);
- Organic wool (GOTS-certified);
- Recycled cotton (GRS- or RCS-certified);
- Recycled polyester (GRS- or RCS-certified);
- Recycled wool (GRS- or RCS-certified);
- Responsibly sourced wool (RWS-certified);
- Plant-based leather alternatives;
- Responsibly sourced leather (Leather Working Group-/LWG- or OEKO-TEX Leather Standard-certified).

Globally, 15% of textiles used to make clothing ends up being discarded as offcuts. The global upcycled fashion market is projected to grow from USD 8.2 billion in 2024 to USD 16.7 billion by 2032 (a CAGR of 9.2%). Europe holds the largest share in terms of revenue and is expected to maintain its leading position in the market. As the bucket hat is made from multiple, relatively small pieces of fabric sewn together, it is an ideal style for garment factories to upcycle pre-consumer fabric waste (cut waste).

Islamic (modest) headwear is a growing market in Europe

The hijab (a headscarf that covers the hair and neck) is a traditional Islamic garment worn by Muslim women to ensure modesty, in line with the teachings of Islam. Islamic scarves and headwear constitute a market with significant growth potential.

In 2016, the total number of Muslims in Europe was roughly 28.5 million, representing a 4.9% share of the total population. Researchers predict that the Muslim population will rise to 57.9 million (11.2%) by 2050 as a result of high fertility and migration rates. Young Muslims believe that their identity is rooted in both faith and modernity, although not all Muslim women wear the traditional hijab.

Until recently, wearing a hijab during sports activities was uncomfortable and restrictive. However, a growing number of professional Muslim sportswomen have become role models who inspire young European Muslim women to participate more in sports. This has encouraged many European sports and outdoor brands (for example Adidas, Berghaus, Trekmates and Puma) to design hijabs specifically for sports use (like running and swimming). These hijabs use lightweight and breathable fabric, may have waterproof properties, and are designed with special features/fastenings that ensure the scarf stays in place during active movement.

Best practice: Superb Group

Superb Group from China has over 40 years of experience and supplies several European apparel brands. The company showcases BSCI-, Sedex-, BCI- and GOTS-certifications, demonstrating strong compliance with social and environmental standards. Their website highlights professional design services, transparent factory capacities and quality control systems.

Tips:

- Visit trade events and stay up to date on the latest design and fabric trends, innovations and new sustainable materials, techniques and technologies. Check exhibitors' lists, as these are good sources for identifying potential buyers and raw material suppliers. Relevant events include the Shanghai Hats, Scarves, Gloves Expo (HSGE), Texworld (Paris) and Première Vision (Paris).
- Consider entering the custom fashion accessories market (for hats and scarves). Research and target promotional products agencies as a first step. Remember that custom fashion accessories may require smaller MOQs and more flexibility.

Participate in a short ZDHC training programme to understand and implement best practices in chemical management. Work towards eliminating the use of chemicals and dyes that are not ZDHC-approved.

FT Journalistiek carried out this study in partnership with Giovanni Beatrice on behalf of CBI.